



Montana Teachers' Retirement System



ACTIVE MEMBERS

Benefit information and
account access



BENEFIT RECIPIENTS

Handbook, forms and
account access



EMPLOYERS

Account access for
insurance, wages and
contributions



Welcome to the new TRS website

Key Information



TRS Online Services

Montana Teachers' Retirement System

Agenda

- ▶ Online Services Overview
- ▶ Insurance Deduction System
- ▶ Wage & Contribution Reporting System
- ▶ Reminders
- ▶ Resources for TRS Employers





Overview



TRS Online Services

- ▶ Upgraded online system for employers
 - ▶ Easier to use and navigate
 - ▶ Easier to enter and correct data
 - ▶ More intuitive user interface
 - ▶ Online manual

- ▶ New Accounts
 - ▶ Employer Representative
 - ▶ Online Administrator
 - ▶ Additional Users

TRS Account Security

Login

Existing User

Username

Password

☐ I would like to edit my account information after login

Login

[Forgot your Username or Password?](#)

New User

Create a TRS account by selecting the button below:

Create



TRS Online Services

- ▶ Insurance Deduction System
 - ▶ August 1, 2014
 - ▶ Significant decrease in help requests from employers

- ▶ Wage & Contribution Reporting
 - ▶ November 2014
 - ▶ Test group feedback on best features:
 - ▶ “User friendly ... Very easy to use”
 - ▶ “Easy to lookup members when you need to make changes”
 - ▶ “Can see details, summaries, and past reports”
 - ▶ “Can add in comments”
 - ▶ “Reports on retirees who are close to max”



Insurance Deduction System



Insurance Deduction System

- ▶ Montana statute allows TRS retirees or other benefit recipients to have their employer sponsored health insurance premiums withheld from their monthly TRS benefit payments.
- ▶ The Employer Insurance Deduction System is designed for employers to record the appropriate insurance deduction amounts for TRS.
- ▶ After payroll is run each month, the withheld funds are sent directly to the employer for payment of health insurance premiums on behalf of the benefit recipient.



Wage & Contribution Reporting

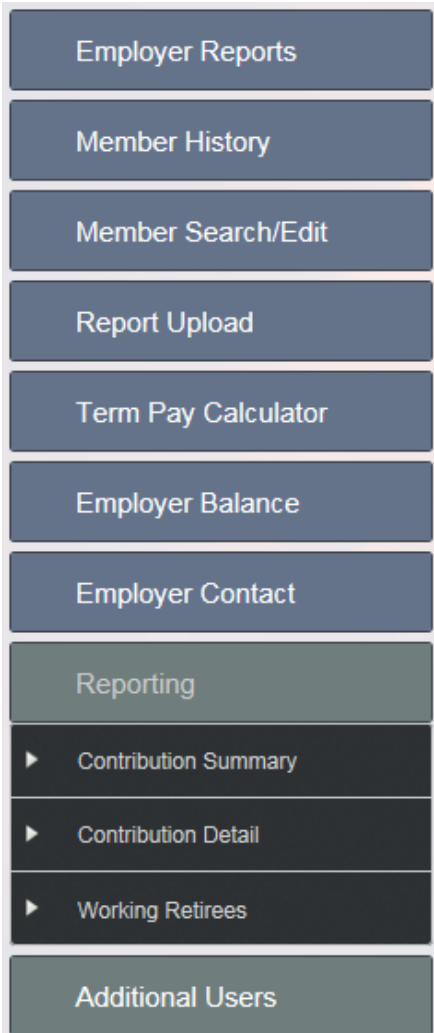


Highlights of New System

- ▶ Replicates existing functionality with improved accessibility and user experience
- ▶ Enforces correction of errors before submission – keeps data clean and prevents repetitive errors
- ▶ Can create new membership online, right away
- ▶ Employer control of who has access
- ▶ Reports can be saved or printed as pdf files
- ▶ File upload is the same – no need to learn new process
- ▶ Less need for TRS assistance – though still available



Wage & Contribution Main Menu



Most of your work will be done in this module.
This is where you will access Employer Reports,
Report Summary, and Member List.
(next 7 slides)












List Employer Report

List Employer Reports

1 K-12 SCHOOLS {Test}

Year Fiscal Year ☒ Calendar Year ☐

Pay Period	No/ Type	Date Submitted	Post	TRS Empe	Earnings	Employee Contribution	Employer Contribution	Over+ Short-	Total Remitted	
09/2014	1 C	09/22/2014		104	306,231.09	24,957.86	26,244.05	.00	51,239.14	  
					Work Retiree		37.23			
08/2014	1 C	09/22/2014		77	278,555.90	22,702.31	23,872.24	.00	46,574.55	 
07/2014	1 C	07/22/2014	✓	77	279,024.77	22,740.50	23,912.50	.00	46,653.00	 
TOTAL YEAR					863,811.76	70,400.67	74,066.02	.00	144,466.69	

New feature!

Report Summary Employer Edit Mode



Report Summary



I K-12 SCHOO {Test}

[Edit Header / View Employee Detail Summary](#)

Pay Period - Report No	09/2014 - 1	Employee Contribution	
Report Type	Contributions	Normal	34,446.83
No of Pay Periods	1	Buyback	.00
Year-End Report		Term Pay	.00
Report Summary		Total	34,446.83
TRS Employees	125	Employer Contribution	
Total FTE	97.19	Normal	36,221.90
Total FTE Hours	888.75	Buyback	450.00
Earnings	422,660.23	Term Pay	.00
TIAA CREF Earnings	.00	TIAA CREF	.00
Working Retiree Earnings	501.75	Working Retiree	54.94
Report Status		Total	36,726.84
Report Status	Employer Editing	Total This Report	
Date Submitted		Amount Due	71,173.67
Date Paid		Amount Remitted	ACH 71,173.67
Date Edited		Over*/Short-	.00
Edit Status	Ready to Edit	Total Balance Due	
Date Posted		Balance Forward	.00
		Amount Due This Report	71,173.67
		Total Balance Due	71,173.67

Note

Employer Edit Report

Run Report

Sample: Employer Edit Report



10/14/2014 5:09 PM		Montana Teachers' Retirement System						Page 1	
		Employer Edit Report							
		1 K-12 SCH00 {Test}							
		Pay Period: 09/2014 - 1							
Member	Name	Tier	Work Stat	Actual Earnings	Service	Part Hours	Member Contrib	Employer Contrib	TP Position Code
3	6	1	F	3,822.00	1.00		311.49		
						Buy Back	.00	450.00	
Error: Buy Back employer contribution reported without an established contract									
5	4	1	P	396.62	.24	34.25	32.32		
Error: Hours are not allowed for members with a Work Status of Part Time									
Warning: The Part Time Work Status reported does not match the Hourly status in the TRS database									
5	8	E	1	W	358.75	35.00			01
!! Warning: Form 146 and required supporting documentation have not been received for this Working Retiree									
5	7	1	W	88.00		8.00			01
!! Warning: Form 146 and required supporting documentation have not been received for this Working Retiree									
5	3	2	H	182.66	.12	16.50	14.89		
!! Warning: TRS Membership forms have not been received									
Warning: The birth date could not be found for this member									
5	9	2	F	2,453.34	1.00		199.95		
!! Warning: TRS Membership forms have not been received									
Warning: The birth date could not be found for this member									
5	3	2	F	2,333.34	1.00		190.17		
!! Warning: TRS Membership forms have not been received									
Warning: The birth date could not be found for this member									
5	2	2	F	2,333.34	1.00		190.17		
Warning: The Full Time Work Status reported does not match the Hourly status in the TRS database									
5	5	1	W	55.00		5.00			01
!! Warning: Form 146 and required supporting documentation have not been received for this Working Retiree									
5	8	2	F	2,688.51	1.00		219.11		
!! Warning: TRS Membership forms have not been received									
Warning: The birth date could not be found for this member									
See totals on next page									



Employer Report Errors and Warnings



Employer Report - Member List



K-12 SCHOO {Test}

Record Selection

All ☒ Errors ☐ Warnings ☐

Sort By

Name ☒ SSN ☐ Work Status ☐ Tier ☐

Search for Member

SSN

Last Name

Find

Reset

Pay Period: 09/2014 - 1

Type: C

Posted: No

| 1 | 2 | 3

SSN	Name	Tier	Work Status	FTE	Earnings	Employee Contrib	Employer Contrib		
9		1	Full Time	1.00	4,029.67	328.42			
6		1	Full Time	1.00	3,822.00	311.49			
					Buyback		450.00		
7		1	Full Time	1.00	4,223.85	344.24			
4		1	Part Time	.24	396.62	32.32			
5		1	Full Time	1.00	4,470.67	364.36			
8		1	Working Retiree	.00	358.75	.00			
1		1	Full Time	1.00	4,909.00	400.08			
5		1	Full Time	1.00	2,989.00	243.60			
9		1	Full Time	1.00	3,763.18	306.70			
0		1	Hourly	.40	667.50	54.40			



Report Summary

Edit Report




TRS Employer Wage & Contribution Reporting System

Edit Report Header



01 K-12 SCHOO {Test}

Pay Period - Report No	09/2014 - 1	
Report Type	Contribution ▼	
No of Pay Periods	<input type="text" value="1"/>	
Balance Forward	<input type="text" value=".00"/>	
Amount Due This Report	<input type="text" value="71,173.67"/>	
Total Balance Due	<input type="text" value="71,173.67"/>	
Amount Remitted	<input type="text" value="70,723.67"/>	ACH ▼
 Note	<div></div>	

Save

Delete



Report Summary Unsubmit



Report Summary



01 K-12 SCHOO {Test}

[View Employee Detail Summary](#)



Pay Period - Report No	09/2014 - 1	Employee Contribution	
Report Type	Contributions	Normal	34,446.83
No of Pay Periods	1	Buyback	.00
Year-End Report		Term Pay	.00
Report Summary		Total	34,446.83
TRS Employees	125	Employer Contribution	
Total FTE	96.95	Normal	36,221.90
Total FTE Hours	923.00	Buyback	.00
Earnings	422,660.23	Term Pay	.00
TIAA CREF Earnings	.00	TIAA CREF	.00
Working Retiree Earnings	501.75	Working Retiree	54.94
Report Status		Total	36,276.84
Report Status	Submitted	Total This Report	
Date Submitted	10/15/2014	Amount Due	70,723.67
Date Paid		Amount Remitted	ACH 70,723.67
Date Edited	10/15/2014	Over+/Short-	.00
Edit Status	Ready to Process	Total Balance Due	
Date Posted		Balance Forward	.00
		Amount Due This Report	70,723.67
		Total Balance Due	70,723.67

Note

Unsubmit Report from TRS

Unsubmit



Report Summary

Contribution Report



10/15/2014

8:50 AM

Montana Teachers' Retirement System

Employer Contribution Summary

01 K-12 SCH00 {Test}

Pay Period: 09/2014 - 1

Report Summary

Report Type	Contribution
# of Pay Periods	1
Year-End Report	No
TRS Employees	125
Total FTE	96.95
Total FTE Hours	923.00
Total Service Months	103.54
Earnings	422,660.23
TIAA CREF Earnings	.00
Working Retiree Earnings	501.75

Report Status

Pay Period Date	09/30/2014
Date Entered	10/14/2014
Date Submitted	10/15/2014
Date Paid	
Edit Status	Ready for TRS
Date Edited	10/15/2014
Report Status	Submitted
Date Posted	
Balance Status	In Balance

Employee Contribution

Normal	34,446.83
Buy Back	.00
Term Pay	.00
Total	34,446.83

Employer Contribution

Normal	36,221.90
Buy Back	.00
Term Pay	.00
TIAA CREF	.00
Working Retiree	54.94
Total	36,276.84

Totals This Report

Total Due	70,723.67
Amount Remitted ACH	70,723.67
Amount Over	.00
Over/Short Balance	
Balance Forward	.00
Over/Short Balance	.00

Signature _____

Name _____

Date _____

Phone Number _____



Report Summary Copy Forward



Report Summary



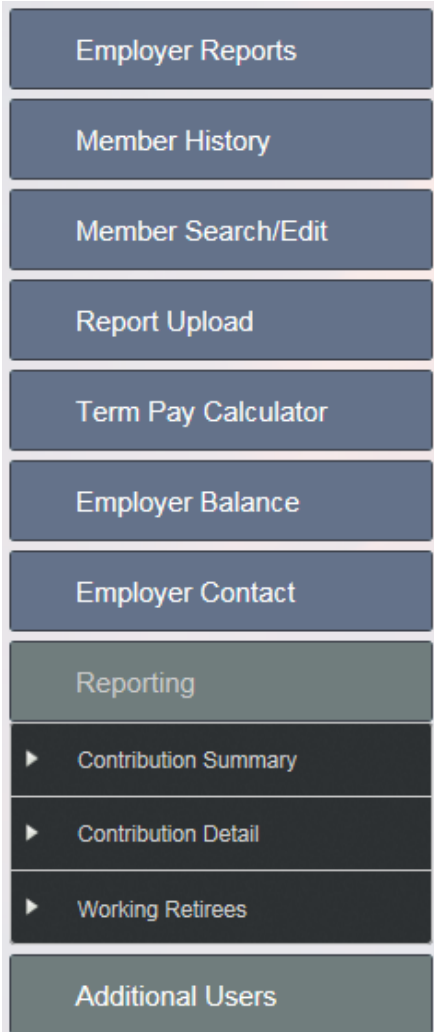
1 K-12 SCHOOLS {Test}		View Employee Detail Summary	
Pay Period - Report No	07/2014 - 1	Employee Contribution	
Report Type	Contributions	Normal	22,740.50
No of Pay Periods	1	Buyback	.00
Year-End Report		Term Pay	.00
Report Summary		Total	22,740.50
TRS Employees	77	Employer Contribution	
Total FTE	75.60	Normal	23,912.50
Total FTE Hours	.00	Buyback	.00
Earnings	279,024.77	Term Pay	.00
TIAA CREF Earnings	.00	TIAA CREF	.00
Working Retiree Earnings	.00	Working Retiree	.00
Report Status		Total	23,912.50
Report Status	Posted	Total This Report	
Date Submitted	07/22/2014	Amount Due	46,653.00
Date Paid	07/25/2014	Amount Remitted	46,653.00
Date Edited	07/30/2014	Over+/Short-	.00
Edit Status	Edited No Errors		
Date Posted	07/31/2014		
Note			
Copy this Report to a new Pay Period			
Pay Period	10/2014 ▼		

Copy





Wage & Contribution Main Menu



Shows the history of TRS contributions for a specific employee. In order to protect privacy, it does not show contribution information from other employers.

You can search the TRS membership database to see if a new employee is already a TRS member. Once that member is your employee, you can update name, address, etc. If they are not your employee, their private information is protected. (*next slide*)



Member Search: New!

Member Search/Edit

01 K-12 SCHOO {Test}

Find Member by SSN or Lookup by Name

SSN Find Lookup

Add Member to TRS +

OR

Member Lookup

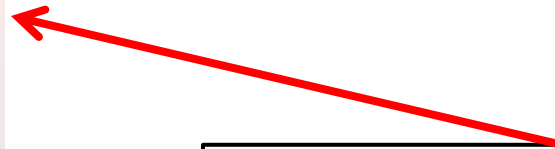
SSN 8699 Last Name First Name Employer Search Clear

Name	SSN	Type	Employer	
, KEN	XXX-XX-8699	Member, Active	090011	
, SUSAN	XXX-XX-8699	Member, Active	070011	
, DAVID	XXX-XX-8699	Member, Retired	560021	
, RAMONA	XXX-XX-8699	Member, Dormant	180091	



Wage & Contribution Main Menu

- Employer Reports
- Member History
- Member Search/Edit
- Report Upload
- Term Pay Calculator
- Employer Balance
- Employer Contact
- Reporting
 - ▶ Contribution Summary
 - ▶ Contribution Detail
 - ▶ Working Retirees
- Additional Users



This function works the same way
as in the current system.
(*next slide*)



Report Upload

TRS Employer Wage & Contribution Reporting System

Upload Report

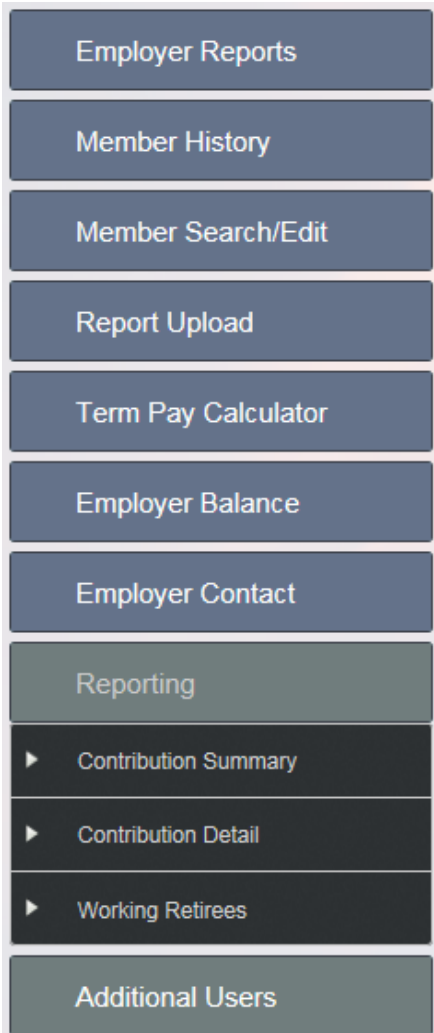
1 ELEMENTA {Test}

Pay Period	10/2014 ▼
Override	No ▼
Upload File	<input type="text"/> Browse...

Upload



Wage & Contribution Main Menu



This is **an enhanced feature** which allows you to calculate employer and employee contributions due for termination pay. (*next 4 slides*)

Term Pay Calculator: Input

No termination date



Term Pay Calculator

999932 TRS TEST EMPLOYER



Member: 888-2852 T [REDACTED], SARAH M

SSN

Find

Lookup

Current Employer	999932 TRS TEST EMPLOYER	
Date of Birth	07/17/1962	
Termination Date		←
Retirement Date		First day of month after Termination Date
Years of Service	.00	Service Verified by TRS on 07/23/2009
Buyback Service Available	.00	
Total Service	.00	
Termination Pay Amount	.00	← Termination Pay Option Both ▼ ←
FICA Withholding Amount	.00	←
Medicare Withholding Amount	.00	←

Please use the term pay calculator to determine the amount of FICA and Medicare to be withheld from a retiring member's termination pay.

FICA withholding: 6.2%
Medicaid withholding: 1.45%
Total withholding: 7.65%

After entering the termination pay amount, you can click on the calculators to calculate the withholdings. When you report withholdings for termination pay, you can override the amount shown when you report; however, you may not withhold more than the percentages above.

Please be sure to report the actual amount to be withheld, not an estimate.

Calculate



Term Pay Calculator : Result

Options 1 & 2



Term Pay Calculator

999932 TRS TEST EMPLOYER

Member: 888-2852 SARAH M

SSN

Find

Lookup

Employer	999932 TRS TEST EMPLOYER	
Date of Birth	07/17/1962	Member's Age 53
Termination Date	01/31/2015	
Retirement Date	02/01/2015	First day of month after Termination Date
Years of Service	21.67	Service Verified by TRS on 07/23/2009
Buyback Service Available	.00	
Total Service	21.67	
Termination Pay Amount	5,000.00	
FICA Withholding Amount	.00	
Medicare Withholding Amount	.00	

Termination Pay Option	Employee Contribution Rate	Employee Contribution Due	Employer Contribution Rate	Employer Contribution Due
* Option 1	3.71%	\$4,019.79	3.88%	\$4,203.98
Option 2	8.15%	\$407.50	10.95%	\$547.50

*Employee Contribution Due Must Be Remitted By Member – Via Personal Payment.

This is an estimate and not to be construed as a firm commitment of the employee and employer contributions to be paid on termination pay.
Many factors may affect the final calculation, including future changes in law and/or administrative rules.

Termination Pay Out-of-Pocket Calculation for Option 1	
Termination Pay Amount	5,000.00
Less FICA Withholding Amount	.00
Less Medicare Withholding Amount	.00
Net Amount (Tax Deferred)	.00
Contribution Due TRS	4,019.79
Out-of-Pocket Expense	4,019.79

Recalculate

Use the 'Recalculate' button to change parameters and recalculate the term pay amount



Term Pay Calculator: Input Option 1



Term Pay Calculator

999932 TRS TEST EMPLOYER



Member: 888-5243 I, JOHN B

SSN

Find

Lookup

Current Employer	999932 TRS TEST EMPLOYER	
Date of Birth	03/18/1954	
Termination Date	06/12/2014	
Retirement Date	07/01/2014	First day of month after Termination Date
Years of Service	22.03	Service Verified by TRS on 01/10/2013
Buyback Service Available	.00	
Total Service	22.03	
Termination Pay Amount	12,905.30	Termination Pay Option 1
FICA Withholding Amount	.00	
Medicare Withholding Amount	.00	

Please use the term pay calculator to determine the amount of FICA and Medicare to be withheld from a retiring member's termination pay.

FICA withholding: 6.2%
Medicaid withholding: 1.45%
Total withholding: 7.65%

After entering the termination pay amount, you can click on the calculators to calculate the withholdings. When you report withholdings for termination pay, you can override the amount shown when you report; however, you may not withhold more than the percentages above.

Please be sure to report the actual amount to be withheld, not an estimate.

Calculate



Term Pay Calculator: Result Option 1



Term Pay Calculator



999932 TRS TEST EMPLOYER

Member: 888-5243 JOHN B SSN

Employer	999932 TRS TEST EMPLOYER	
Date of Birth	03/18/1954	Member's Age 60
Termination Date	06/12/2014	
Retirement Date	07/01/2014	First day of month after Termination Date
Years of Service	22.03	Service Verified by TRS on 01/10/2013
Buyback Service Available	.00	
Total Service	22.03	
Termination Pay Amount	12,905.30	Termination Pay Option 1
FICA Withholding Amount	.00	
Medicare Withholding Amount	.00	

Termination Pay Option	Employee Contribution Rate	Employee Contribution Due	Employer Contribution Rate	Employer Contribution Due
Option 1	3.36%	\$9,552.61	3.51%	\$9,979.06
Retirement application on file.				

Termination Pay Out-of-Pocket Calculation for Option 1		
Termination Pay Amount	12,905.30	An 'Out of Pocket Expense' represents the additional employee contribution due to fund an increase in the Member's monthly retirement benefit.
Less FICA Withholding Amount	.00	
Less Medicare Withholding Amount	.00	
Net Amount (Tax Deferred)	12,905.30	
Contribution Due TRS	9,552.61	
Out-of-Pocket Expense	.00	

Use the 'Recalculate' button to change parameters and recalculate the term pay amount





Wage & Contribution Main Menu

- Employer Reports
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- Report Upload
- Term Pay Calculator
- Employer Balance
- Employer Contact
- Reporting
 - ▶ Contribution Summary
 - ▶ Contribution Detail
 - ▶ Working Retirees
- Additional Users

New feature! It shows a list of any submitted or posted reports that contribute to a balance forward (over/short).
(*next slide*)





Employer Balance

Employer Balance

999932 TRS TEST EMPLOYER

Summary

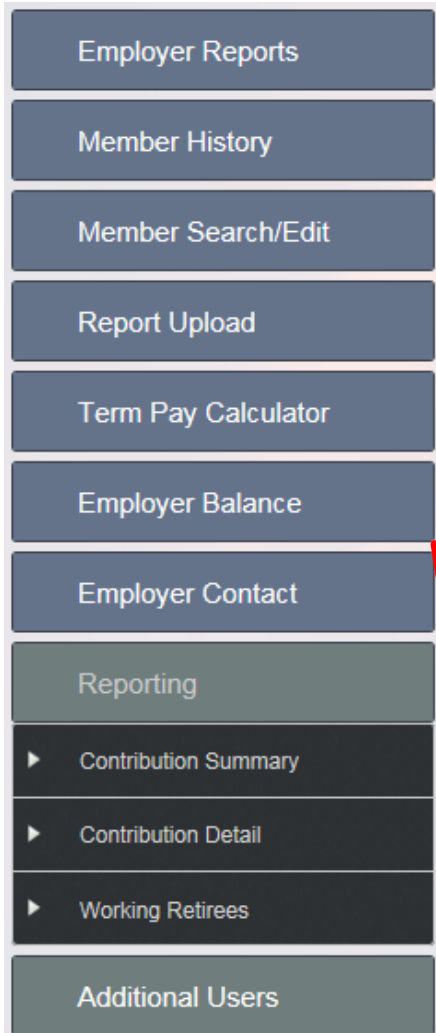
Balance Forward	150.00
Unposted Reports	.00
Total Balance Due	150.00

Detail

Type	Pay Period	Employee Contribution	Employer Contribution	Total Due	Total Remitted	Over/Short	Balance Forward	Note	
Balance Forward									
C	06/2014 - 1	685,007.33	710,162.35	1,395,169.68	1,395,144.68	-25.00	150.00		
C	05/2014 - 1	281,010.66	294,520.30	575,530.96	575,705.96	175.00	175.00		



Wage & Contribution Main Menu



Employer name and contact information for payroll/HR should be updated here whenever necessary.

You can run PDF reports anytime and print or save to your computer. *The system does not save previously run reports.*

Contribution Summary is a PDF version of the Report Summary screen (*Employer Reports section*). If you pay your contributions by check, rather than EFT/ACH, you will print, sign, and mail this with your check.

Contribution Detail is a PDF version of the Member List screen (*Employer Reports section*).

Working Retirees is a PDF report of how close your TRS working retiree employees are to their maximum earnings limit.
(*next slide*)



Working Retiree Report

09/17/2014

10:58 AM

Montana Teachers' Retirement System

Employer Working Retirees

999932 TRS TEST EMPLOYER

Page 1

If any of your Teachers' Retirement System (TRS) working retirees are in jeopardy of exceeding their current Fiscal Year (FY) maximum allowable earnings, please advise them as soon as possible in order to avoid possible repayment of their monthly retirement benefits to the TRS, or suspension of their monthly TRS benefits, later this FY.

Note: The "Actual FY Earnings Reported To Date" figure includes any earnings from unposted contribution reports.

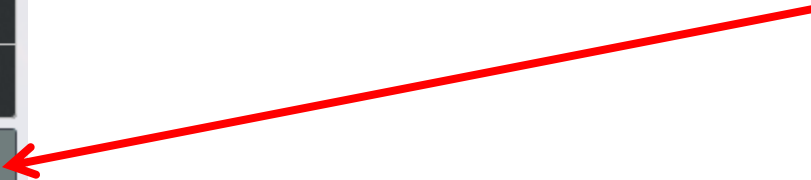
Member	Name	Tier	Unposted Earnings	Current FY Maximum Allowable Earnings	Actual FY Earnings Reported To Date	% of FY Maximum Allowable Earnings Reported To Date	Remaining FY Maximum Allowable Earnings	Actual FY Hours Reported To Date
888-15 A	E	1	750.00	24,272.01	750.00	3%	23,522.01	52.50
888-11 B	NE W	1	900.00	20,245.90	900.00	4%	19,345.90	63.00
888-10 E		1	550.00	20,245.90	550.00	3%	19,695.90	38.50
888-16 E		1	500.00	20,245.90	500.00	2%	19,745.90	35.00
888-15 G	P	1	750.00	25,412.97	750.00	3%	24,662.97	52.50
888-18 H	NE A	1	950.00	25,952.86	950.00	4%	25,002.86	66.50
888-18 J	A	1	550.00	27,879.91	550.00	2%	27,329.91	38.50
888-19 K	A	1	2,223.00	20,245.90	2,223.00	11%	18,022.90	111.50
888-14 M	GE A	1	427.50	20,245.90	427.50	2%	19,818.40	31.50



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- Additional Users

New feature! The Online Administrator will use this selection in order to give access to Additional Users, once they have registered online and submitted their user name (*but not password!*) to you.






Quick Start Guide

Wage & Contribution Reporting System Quick Start Guide 4

Login Access: Step 1



1. Click on **Employers** on the home page of the TRS website.
 - The link is located on the top of the home page or on the left hand menu.
2. Scroll down to the **Employer Reporting to TRS** section
3. Click on **Wage & Contribution Reporting System** link

ACTIVE MEMBERS
Benefit information and account access

BENEFIT RECIPIENTS
Handbook, forms and account access

EMPLOYERS
Account access for insurance, wages and contributions

Employer Reporting to TRS

- [Insurance Deduction System](#)
- [Wage & Contribution Reporting System](#)
- [TRS Contribution Rates, Interest Rates, and Median Average Salary Charts](#)

TRS will have a Quick Start Guide available on the Wage & Contribution Reporting System web page to help you get started.



Online Manual – Table of Contents

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- Wage & Contribution Reporting System Online Manual
 - Overview
 - Logging In
 - Using the System
 - Welcome Screen and Menu
 - "Find" and "Lookup" functions
 - Employer Reports
 - General Reporting Requirements
 - Step-by-Step Procedures
 - Resolving Error and Warning Messages
 - Member History
 - Member Search/Edit
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 - Term Pay Calculator
 - Employer Balance
 - Employer Contact
 - Reporting
 - Additional Users
 - Change Employer

Wage & Contribution Reporting System Online Manual [DRAFT]

Page last updated 10/3/14

Welcome to the Online Manual for the TRS Wage & Contribution Reporting System

This online system manual will help you use the **Wage & Contribution Reporting System** to manage contributions for TRS members. The manual is intended as a system guide only. For TRS policy, forms, and employer reference materials, visit the [Employers](#) page of the [TRS website](#).

NOTE: This manual is designed to be viewed online using the *Online Manual* link when you are logged into the Wage & Contribution Reporting System. This ensures that you always are viewing the most current version of the manual.

➔ Click any item in the Table of Contents (at left) to view that topic.
○ Or, use the buttons in the upper right corner of this window to move forward or backward through the manual.

If you are new to the Wage & Contribution Reporting or need a refresher, be sure to read the [Overview](#) before proceeding.

Do you have questions or suggestions for this Online Manual? Please let us know!

Contact:
Montana Teachers' Retirement System
(406) 444-3134
Toll free: 1-866-600-4045
email: [trsoutreach\[at\]mt.gov](mailto:trsoutreach[at]mt.gov)

Once you have entered the Wage & Contribution Reporting System, you will have access to the Online Manual.



Reminders



TRS Employers

- ▶ The following entities must report all TRS eligible employees to TRS:
 - ▶ State of Montana including state agencies
 - ▶ Public School District
 - ▶ Board of Public Education
 - ▶ Education Cooperatives
 - ▶ Montana School for the Deaf & Blind
 - ▶ Montana Youth Challenge Program
 - ▶ State Youth Correctional Facility
 - ▶ Montana University System & Community Colleges
 - ▶ Political subdivisions (*e.g. county*)
 - ▶ Instrumentality of the State (*e.g. CSPD, RESA*)

TRS Members

- ▶ A person employed at least 210 hours during the fiscal year in a position reportable to TRS must become a member of TRS.
- ▶ TRS membership is not dependent on the job title but on the responsibilities and duties of the position.





TRS Retiree

- ▶ A TRS member is considered to be retired once they have:
 - ▶ Terminated all employment in all positions reportable to TRS, including a bona fide separation from service, *and*
 - ▶ Received at least one monthly benefit payment

- ▶ A TRS member who
 - ▶ Has not attained normal retirement age of 60 *and*
 - ▶ Has a prearranged agreement to return to work for their pre-retirement employer
 - ▶ has *not* terminated employment and is not eligible for retirement benefits.





Hiring TRS Retired Members

- ▶ 150 calendar day break in service
 - ▶ Retired TRS members may not return to work in a TRS position until 150 calendar days have elapsed.

- ▶ Working Retirees
 - ▶ Must comply with break in service and earnings limitations.
 - ▶ Employers must submit contributions for their working retirees.

- ▶ Independent contractors
 - ▶ Retired TRS members who return to work as an independent contractor must be reported to TRS and must comply with all necessary limitations.



Resources for TRS Employers

TRS MCEL Presentations



- ▶ Thursday, October 16, 2014
 - ▶ 3:10 – 4:00 pm TRS Online Services

- ▶ Friday, October 17, 2014
 - ▶ 8:40 – 930 am TRS Online Services



TRS Website



- ▶ The TRS website is located at: www.trs.mt.gov
- ▶ Active Members
- ▶ Benefit Recipients
- ▶ Employers
- ▶ Resources
- ▶ About TRS
- ▶ TRS Board
- ▶ Contact TRS



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TRS Staff



- ▶ Our staff members are available to help you with questions or problems that you may have.
- ▶ Website: www.trs.mt.gov
- ▶ Phone: (406) 444-3134 / (866) 600-4045
- ▶ Email: trswebadmin@mt.gov
- ▶ The Contact TRS Staff page on the website has information on specific staff members who can help you address specific questions.

Thank You!

